Question

What different types of ArtiosCAD Enterprise defaults migration exist? How do I perform them and establish security?

Online help

This document identifies the types and starting points for the Enterprise defaults migrations that exist. For specific details, see the online help available in ArtiosCAD, or follow the link at http://help.esko.com/docs/en-us/artioscadenterprise/12.1/adminguide/home.html for English or specify your language code and Country.

ArtiosCAD 16

Once an ArtiosCAD 16 version is installed, all versions of 16 and higher will share the same serverlib. This means that defaults will no longer need to be migrated between versions.

New defaults for the new version will still need to be installed. For ArtiosCAD Standard that means the defaults server will need to be updated. This is just an installation of ArtiosCAD on the defaults server which will handle the installation of the new defaults.

ArtiosCAD Enterprise will also need to have new defaults installed. This is done from the ArtiosCAD Enterprise installer:

- Unknown Attachment

Defaults migration types

1. Migrate standard edition shared defaults to Enterprise edition shared defaults
   a. Use this option to migrate standard shared defaults configured in a standard edition deployment to a new Enterprise deployment.
   b. ArtiosCAD Enterprise is installed for the first time.
   c. Shared defaults are those seen by all users in the network.
a. Use this option to migrate users defaults from a standard version of ArtiosCAD to a new Enterprise deployment for a given user.
b. ArtiosCAD Enterprise is installed for the first time.

3. **Migrate standard edition user defaults serving as defacto standard location defaults to Enterprise location defaults.**
   a. Use this option for scenarios where the standard edition users defaults were circumvented and manually edited to effectively function as location defaults for a standard deployment. This configuration is not a typical configuration supported by Esko and would have required manual changes by the admin.
b. ArtiosCAD Enterprise is installed for the first time.

4. **Migrate standard edition shared defaults to Enterprise location defaults.**
   a. Defaults for standard ArtiosCAD were never fully supported over a WAN as it was not feasible to install shared defaults at a remote site over the WAN. Therefore shared defaults had to be installed for each site. Over time, shared defaults could have evolved to effectively become location defaults for a standard deployment.
b. ArtiosCAD Enterprise is installed for the first time.

5. **Migrate Enterprise shared defaults to a new Enterprise version.**
   a. Use this option to migrate existing Enterprise shared defaults to a new Enterprise version

6. **Migrate Enterprise location defaults to a new Enterprise version**
   a. Use this option to migrate existing Enterprise location defaults to a new Enterprise version

7. **Migrate Enterprise user defaults from to a new Enterprise version**
   a. Use this option to migrate existing Enterprise user defaults to a new Enterprise version

8. **Configuring Enterprise defaults**
   a. **Security**
      i. Defaults security can be controlled by inviting users to the respective projects and setting appropriate permissions.
   b. **Configuring defaults for a different location**
      i. Users at one location can configure and use defaults at another location.

9. **Availability**
   a. Use this feature to determine what defaults at a particular can be dragged into the next level, for example, dragging a shared default into the location/user level or from the location level into the user level.

10. **Zipping**
   a. Use this option to send your configuration to Esko support or as a rudimentary backup.

**Answer**

1. **Migrate standard edition shared defaults to Enterprise edition shared defaults**
   a. As an admin, run the ArtiosCAD Enterprise defaults installer on the machine that has the desired version of the standard edition shared default.

2. **Migrate standard edition user default to Enterprise edition user defaults.**
2. This is done from Enterprise ArtiosCAD on the user’s machine, performed by the logged-in user.

3. Migrate standard edition user defaults serving as de facto defaults to Enterprise location defaults
   a. As an admin from the ArtiosCAD Enterprise version, run
   b. Select the Enterprise location you are migrating to and click the Create Defaults button.
c. Migrate user defaults to location defaults:

   a. As an admin from the ArtiosCAD Enterprise version, run
b. Select the Enterprise location you are migrating to and click the **Create Defaults** button.

![Create Defaults button](image)

Migrate Shared defaults to Location defaults:

- **Migrate Shared Defaults to Location**
- **Migrate User Defaults to Location**

![Migrate Shared Defaults to Location](image)

5. **Migrate Enterprise shared defaults from to a new Enterprise version.**
   a. As an admin, run the ArtiosCAD Enterprise defaults installer on

![Defaults Source](image)
b. This option will also allow the user to copy an existing Enterprise location and/or users defaults to a new Enterprise version.

6. Migrate Enterprise location defaults from to a new Enterprise version
   a. At the time of installing the new Enterprise version, locations can be migrated:

   ![Image of a wizard window for selecting default options]

   - Use WC to perform a raw copy of ACadDefaults_X.Y_<lang z>_location to ACadDefaults_X(+1).Y(+1)_<lang L>_location
   - Use the **Defaults Migration** tool which is installed under the **Esko/ArtiosCAD** folder in the **Defaults Migration** menu on the same machine for which the new Enterprise defaults were installed (available with ArtiosCAD 14).
   - Use the **Defaults Migration** tool which is installed under the **Esko/ArtiosCAD/Migration Tools** folder in the **Start** menu installed with each ArtiosCAD client (available with ArtiosCAD 14).
   - The **Defaults Migration** tool allows for post installation migration of both Location and User Defaults:

   ![Image of the Defaults Projects Migration window]

   b. If all the locations have not been migrated at installation time of the new version’s shared defaults, do any of the following at a later date:

   i. Use **WC** to perform a raw copy of ACadDefaults_X.Y_<lang z>_location to ACadDefaults_X(+1).Y(+1)_<lang L>_location
   ii. Use the **Defaults Migration** tool which is installed under the **Esko/ArtiosCAD/Migration Tools** folder in the **Start** menu on the same machine for which the new Enterprise defaults were installed (available with ArtiosCAD 14).
   iii. Use the **Defaults Migration** tool which is installed under the **Esko/ArtiosCAD/Migration Tools** folder in the **Start** menu installed with each ArtiosCAD client (available with ArtiosCAD 14).
   iv. The **Defaults Migration** tool allows for post installation migration of both Location and User Defaults:

7. Migrate Enterprise user defaults from to a new Enterprise version
a. At the time of installing the new Enterprise version, user defaults can be migrated.

b. If all the users have not been migrated at installation time of the new version's shared defaults, do any of the following at a later date:
   i. Use WC to perform a raw copy of ACadDefaults_X.Y_<lang z>_user to ACadDefaults_X(+1).Y(+1)_<user>.
   ii. Use the Defaults Migration tool which is installed under the Esko /ArtiosCAD/Migration Tools folder in the Start Menu on the same machine for which the new Enterprise defaults were installed (available with ArtiosCAD 14).
   iii. Use the Defaults Migration tool which is installed under the Esko /ArtiosCAD/Migration Tools folder in the Start Menu installed with each ArtiosCAD (available with ArtiosCAD 14).
   iv. The Defaults Migration tool allows for post installation migration of both Location and User Defaults:

8. Configuring Enterprise defaults:
   a. **Security**
      i. ArtiosCAD Enterprise Shared, Location and User defaults are stored as projects in the WebCenter database of the form ACadDefaults_<version>_<language code>_Shared,
         ACadDefaults_<version>_<language code>_<company>_<location>
         and ACadDefaults_<version>_<language>_<user> respectively.
         1. To ensure users can read the appropriate level defaults, ensure they are invited to the project with view and download permissions for the project and folders.
         2. To allow users to be able to configure defaults, ensure they have add and delete permissions for the project and folders.
   b. Configuring defaults for a different location
i. To allow a user at one site to be able to configure or use defaults at a different site, change the users location

![Image of Change Location dialog]

9. Availability
   a. This is an additional level of security. Even though shared defaults may not be configurable by a certain user, an admin may want to control what default types may be overridden by dragging a default into the location and/or user defaults. So if the admin wants to lock down a particular type of default so that the ArtiosCAD user cannot drag it into location or user defaults, the availability option is used. Setting the Default option allows it to be dragged into the next level.

![Image of Availability settings]

10. Zipping
    a. A user can export defaults to a zip folder. This can be used to send to Esko support or a very rudimentary backup by using folders.

    ! The project folder permissions are not maintained in the zip file.

![Image of Export to ZIP dialog]